

FUNCTIONAL REQUIREMENTS MATRIX

Functional Category: Personnel Administration

Vendor Response Codes:

S = Standard Function ("Out-of-the-Box")

M = Modification Required

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Reference Number	Business Requirements	Vendor Response	Comments	Cost to Modify	Hours to Modify	Upgrade Impact
	Personnel Administration General Requirements					
PA 1.00	The Personnel component will maintain and make available extensive information pertaining to each employee, including employee demographics and chronological history of employment.					
PA 2.00	System must store and retrieve employee data in numerous individual and aggregate formats for such purposes as Employee Relations' negotiations, affirmative action, performance evaluations, employee suggestion program, FLSA and EEO-4 reporting and employee training history and skills bank.					
PA 3.00	System shall include an integrated imaging capability for linking scanned data to personnel records					
PA 4.00	System must allow the maintenance of an employee's data to be accomplished by all key agencies that have the need and the security to review/edit this data.					
PA 5.00	System provides for effective dating of personnel transaction with approved future transactions when transactions are entered and the ability to define how far in advance transactions may be entered.					
PA 6.00	System must have the ability to cancel future dated transactions					
PA 7.00	The system will insure that all data entry defaults comply with Civil Service Rules, Court Orders, State law, Federal requirements and State Policies & Procedures.					
PA 8.00	The Personnel component will maintain and support all the basic employee data through the life of the employee's involvement with the State of Tennessee. The Personnel record for the employee begins at the time the individual's application is accepted for employment consideration. Maintenance continues through the hiring process, through all promotions, transfers, job changes and other personnel changes through separation from the State.					
PA 9.00	System supports functionality for contract workers, volunteer workers, and other non-employees					
PA 10.00	Personnel Administration will be integrated with components of the State ERP system including					
PA 10.01	Benefit Administration					
PA 10.02	Position Control					

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PA 10.03	Applicant Tracking					
PA 10.04	Payroll					
PA 10.05	Timekeeping					
PA 10.06	Leave Accounting					
PA 10.07	Classification/compensation					
PA 10.08	Training					
PA 10.09	Financial information					
PA 11.00	System interfaces with the following:					
PA 11.01	Employee retirement system					
PA 11.02	Worker's comp					
PA 11.03	TENNCARE					
PA 11.04	TRIPS					
PA 11.05	State licensing agencies (DMV, Health, Commerce & Insurance, etc.)					
PA 11.06	Unemployment insurance					
PA 12.00	System assigns and tracks multiple restrictions and / or requirements to position (i.e., physical requirements / restrictions, licenses, fingerprinting, drug program, criminal history, Certifications, etc.). Flexibility available in this area to allow for differences in agencies.					
PA 13.00	The system will provide an appropriate level of security such that confidential data is not readily available to those not qualified to receive it via report or view it via screen.					
PA 14.00	System should provide ability to designate any employee information data as "confidential" and restrict access accordingly through security.					
PA 15.00	System should allow employee to designate address and contact information as available for release (home phone, address, and email)					
PA 16.00	System provides user defined multi-step approval/workflow for review and approval of all personnel transactions					
PA 17.00	System should provide for the creation of an agency employee directory containing business address, business phone and e-mail. This directory should viewable through the use of an industry-standard web browser.					
PA 18.00	System should provide the ability to capture and report on employee turnover.					

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PA 19.00	System tracks employee turnover rate by user defined criteria, including:					
PA 19.01	Gender					
PA 19.02	ethnicity					
PA 19.03	Appointment to class date					
PA 19.04	Transfer					
PA 19.05	Age					
PA 19.06	Classification					
PA 19.07	Probation release					
PA 19.08	Termination					
PA 19.09	ADA qualified					
PA 19.10	Promotion					
PA 19.11	Disciplinary release					
PA 19.12	Demotion					
PA 19.13	Resignation					
PA 20.00	System should support the tracking of Employment Eligibility Verification (I-9s).					
PA 21.00	Ability to link one position to another for the purpose of identifying superior/subordinate relationships					
PA 22.00	Ability to designate when an employee may hold more than one position by Agency and job class					
PA 23.00	When an employee occupies more than one position, the system must provide the ability to designate one as primary					
PA 24.00	Provide for employee self service with at least the following (additional items in Benefit Administration, Timekeeping, etc.):					
PA 24.01	Maintenance of personal data (name, address, W-4 information, marital status, emergency information, etc..)					
PA 24.02	Enter and review the status of suggestions provided under the employee suggestion program					
PA 24.03	Exit interviews					
PA 24.04	Configurable by the State with the appropriate security.					
PA 25.00	System easily processes reorganization. Capabilities that must be included are:					
PA 25.01	Move organization units between higher level organization units					

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PA 25.02	Combine organization units of the same level					
PA 25.03	Provide history on all reorganizations					
PA 26.00	Reorganizations shall also update personnel, payroll, budget, and financial information as appropriate once approved and accepted.					
PA 27.00	System should provide ability to reclassify positions and the individuals within those positions globally - the process should be initiated via an online transaction					
PA 28.00	System shall maintain a history of all reclassifications					
PA 29.00	System should provide that new hire or employee change data be edited against the position table for class and salary grade/pay level.					
PA 30.00	System should provide ability to link the FLSA status to a position and provide the option to override the FLSA status through the employee assignment.					
PA 31.00	The system must support the approximate volumes presented below plus annual growth of 10% for the next 10 years:					
PA 31.01	Employees - 45,000					
PA 31.02	New hires per month - 600					
PA 31.03	Personnel transactions per month - 3,000					
PA 31.04	Job classifications - 2,600					
Employee Maintenance / Personnel Data Changes						
PA 32.00	Employee data changes may be entered at any location as controlled by security					
PA 33.00	Ability to enter multiple transactions with the same effective date with a user defined hierarchy.					
PA 34.00	System automatically produces a letter to the employee verifying personnel changes for certain events as defined by the user with the ability to override the production of a letter on individual transactions					
PA 35.00	System will automatically email an the employee confirming personnel changes when this action is specified by the employee as defined by user					
PA 36.00	System automatically calculates critical dates based on the employee status and the effective date of the transaction (e.g., end of probationary period). User has the ability to define date driven events.					

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PA 37.00	System automatically flags employees that require personnel action (e.g., longevity payments) and institutes notification to appropriate personnel based on user defined criteria					
PA 38.00	System provides the ability to link spouses when both work for the State for use in determining eligibility for certain types of benefits					
PA 39.00	System links personnel action changes to key changes based on relational edits					
PA 40.00	System allows for multiple personnel actions for a single employee. At a minimum, the following transaction types must be supported:					
PA 40.01	Rehire					
PA 40.02	Reinstate					
PA 40.03	Transfer					
PA 40.04	Change of class					
PA 40.05	Regular appointment (full or part time, civil service)					
PA 40.06	Temporary Appointment (full or part-time, executive service only)					
PA 40.07	Seasonal Appointment (full or part-time, executive service only)					
PA 40.08	Emergency Appointment (full-time only, executive service appointment in civil service position)					
PA 40.09	Temporary Provisional Appointment (full-time only, executive service appointment in career service position)					
PA 40.10	Interim Appointment (full-time only, executive service appointment in cs position from a register)					
PA 40.11	Limited Term Appointment (full-time only, executive service appointment in cs position)					
PA 40.12	Reappointment of Retiree (full or part-time, regular or interim appointment in cs or executive position)					
PA 40.13	Administrative Adjustment (salary adjustment)					
PA 40.14	Equity Increase (salary adjustment)					
PA 40.15	Salary Policy Adjustment (salary adjustment)					
PA 40.16	Adjustment to minimum of salary range (salary adjustment)					
PA 40.17	Pay/Shift Differential Adjustment (salary adjustment)					
PA 40.18	Working out of Class Adjustment (salary adjustment)					
PA 40.19	Upgrade Adjustments (salary adjustment)					
PA 40.20	Promotions					

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PA 40.21	Demotions for Cause					
PA 40.22	Voluntary Reductions in Rank					
PA 40.23	Involuntary Reductions in Rank					
PA 40.24	Transfers					
PA 40.25	Reclassifications					
PA 40.26	Career Path Changes					
PA 40.27	Flex Reclassifications					
PA 40.28	Reallocations					
PA 40.29	Dismissals (termination/separation)					
PA 40.30	Retirement (termination/separation)					
PA 40.31	Expiration of Appointment (termination/separation)					
PA 40.32	Death (termination/separation)					
PA 40.33	Layoff (termination/separation)					
PA 40.34	Disability Retirement (termination/separation)					
PA 40.35	Dismissal – Gross Misconduct (termination/separation)					
PA 40.36	Resigned not in Good Standing (termination/separation)					
PA 40.37	Personal (termination/separation)					
PA 40.38	Job Change (termination/separation)					
PA 40.39	For Health (termination/separation)					
PA 40.40	To Remain at Home (termination/separation)					
PA 40.41	For Better Pay (termination/separation)					
PA 40.42	Moved from Area (termination/separation)					
PA 40.43	Return to School (termination/separation)					
PA 40.44	Job Dissatisfaction (termination/separation)					
PA 40.45	Other Reasons (termination/separation)					
PA 40.46	Job Abandonment (termination/separation)					
PA 40.47	Mandatory Retirement (termination/separation)					
PA 40.48	Incentive Retirement (termination/separation)					
PA 40.49	Suspension					
PA 40.50	Special Leave (Normally used for Illnesses)					
PA 40.51	Maternity Leave					
PA 40.52	Educational Leave With Pay					
PA 40.53	Board of Claims (Worker's Comp)					
PA 40.54	Military Leave Without Pay					

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PA 40.55	Educational Leave Without Pay					
PA 40.56	Sick Leave Bank					
PA 40.57	Return from Suspension					
PA 40.58	Return from Leave					
PA 40.59	FMLA					
PA 40.60	Addition of skill, certificate, qualification, etc. (note: this may result in a salary adjustment based on rules in Compensation requirements)					
PA 40.61	User defined					
PA 41.00	The system will provide for multiple types of promotions. At a minimum, the following must be supported:					
PA 41.01	Permanent promotion					
PA 41.02	Special Salary Upgrade					
PA 41.03	Probationary promotion					
PA 41.04	Temporary promotion					
PA 42.00	Capability to require that appointments be associated with a valid Certificate of Eligibles for the appointing Agency					
PA 43.00	System must provide the capability for user defined edits for all transactions					
PA 44.00	System should provide for the creation of user-defined employee checklists for various processing activities such as new hire and separation.					
PA 45.00	Support the following capabilities for layoff processing					
PA 45.01	Produce RIF list using user defined parameters and taking transfer, bumping, etc. into consideration					
PA 45.02	Notify employees that may be impacted					
PA 45.03	Generate COBRA letters for those terminated					
PA 45.04	Generate updated RIF list for rehires, transfers, etc.					
PA 45.05	Lists may be edited by users with appropriate security and then released for processing					
PA 45.06	Change status for those terminated					
PA 46.00	System allows transfers of an employee to another agency and provides access all historical data for the employee to the new organization					

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PA 47.00	System defines multiple separation codes:					
PA 47.01	Discharged:					
PA 47.02	For conduct					
PA 47.03	For performance					
PA 47.04	Other user defined					
PA 47.05	Resignation:					
PA 47.06	In lieu of discharge					
PA 47.07	Voluntarily quit					
PA 47.08	Personal					
PA 47.09	Returned to school					
PA 47.10	Marriage					
PA 47.11	Disliked job					
PA 47.12	Another job					
PA 47.13	Move					
PA 47.14	Deceased					
PA 47.15	Retired					
PA 47.16	Medical					
PA 47.17	Other user defined					
PA 48.00	System has the ability to attach notes to personnel transactions and/or fields					
	Skills Inventory					
PA 49.00	System provides the ability to track qualifications and skills for employees					
PA 50.00	Each employee may have an unlimited number of skills					
PA 51.00	Skills and qualifications may be specified and stored for a job class, position, etc.					
PA 52.00	For each skill, the following information must be maintained:					
PA 52.01	Skill code					
PA 52.02	Skill description					
PA 52.03	Experience level					
PA 52.04	Last year used					
PA 52.05	Last location used					
PA 52.06	Proficiency level					
PA 52.07	Effective date					

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PA 52.08	Expiration date					
PA 53.00	Skills inventory integrates with other areas of the system to allow skill information to be used for various functions, including:					
PA 53.01	New hires					
PA 53.02	Recruiting and applicant tracking					
PA 53.03	Transfers					
PA 54.00	Skills inventory integrates with payroll for the purpose of allowing payroll to calculate pay that is dependent on various skills					
	Longevity					
PA 55.00	System must support a comprehensive longevity program					
PA 56.00	System provides tickler reports for forthcoming longevity payments					
PA 57.00	System tracks an employee's receipt of longevity pay					
PA 58.00	System must support longevity awards by various measures, including:					
PA 58.01	Months of Service					
PA 58.02	Years of Service					
PA 58.03	Adjust longevity payment due date based on actual months worked					
PA 58.04	System must integrate with payroll calculations					
	Performance Evaluation					
PA 59.00	System provides federal government reporting requirements (i.e. EEO-4, Affirmative Action).					
PA 60.00	System triggers an evaluation X days prior to due date based on:					
PA 60.01	Due date					
PA 60.02	Hours worked					
PA 60.03	End of probation					
PA 60.04	Promotion					
PA 60.05	Transfers					
PA 60.06	Other					
PA 61.00	Automatically extend probation date when employee on leave based on user defined parameters					
PA 62.00	Track evaluation results by employee					
PA 63.00	System allows overrides to evaluation dates					
PA 64.00	System tracks probationary periods for performance evaluations.					

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PA 65.00	System should allow for the tracking of variable probationary periods (e.g., for new hires, after promotions, for performance reasons) which are based on user defined rules for each job class.					
PA 65.01	Time limits					
PA 65.02	Type of probation (initial or subsequent)					
PA 65.03	Extensions of probation based on performance					
PA 66.00	System provides notices to agencies for personnel evaluations not received.					
PA 67.00	System allows statistical reporting on performance evaluations.					
PA 68.00	System provides for and tracks improvement needed performance situations and triggers follow-up at user defined interval (as defined by Agency)					
PA 69.00	System edits performance evaluation data to ensure all required information is provided					
PA 70.00	System provides option of completing performance evaluations using online (internet enabled) documents					
PA 71.00	Provide ability to supplement standard performance evaluation forms (online and printed) with user defined information based on class, dept, etc.					
PA 72.00	Performance evaluations are integrated with recruiting to provide input to potential internal managers (consistent with employee privacy requirements)					
PA 73.00	Performance evaluations are integrated with recruiting to provide for the calculation of performance bonus points for promotional appointments					
PA 74.00	Provide ability to link compensation to performance evaluation					
PA 75.00	Maintain history of all performance evaluations					
	Grievances					
PA 76.00	Automatically route grievance information to appropriate personnel					
PA 77.00	Provide ability to define steps in the grievance process					
PA 78.00	Track the current status of any grievance					
PA 79.00	Track types of grievances					
PA 79.01	Performance evaluations					
PA 79.02	Disciplinary actions					

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PA 79.03	Other					
PA 80.00	System tracks by grievant and respondent(s)					
PA 81.00	Provide historical information for all grievances					
	Disciplinary Actions					
PA 82.00	Proposed disciplinary actions are entered online by appropriate State personnel					
PA 83.00	Automatically route information to HR, supervisors, etc. regarding proposed disciplinary actions					
PA 84.00	Provide ability to define steps in the disciplinary action process					
PA 85.00	The system provides warning when final disciplinary action decisions are not determined in a timely manner					
PA 86.00	System tracks all disciplinary actions:					
PA 86.01	Letters of reprimand					
PA 86.02	Letters of intent					
PA 86.03	Reductions for cause					
PA 86.04	Suspensions					
PA 86.05	Discharge					
PA 87.00	Provide historical information for all disciplinary actions					
	Employee Suggestion Program					
PA 88.00	System provides for the submission, evaluation, and management of employee suggestions.					
PA 89.00	System shall allow for employees to submit suggestions directly into the system using internet technology					
PA 90.00	System shall allow for employees to inquire on the status of the suggestions which they submit.					
	Automatic notification to users (DOP and agency) on pending suggestions					
PA 91.00	System shall track costs associated with the administration of the employee suggestion program.					
PA 92.00	System shall provide for the tracking of costs and benefits associated with the implementation of suggestions					
PA 93.00	System shall provided for the following levels of online approval as defined by the user; for example:					

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PA 93.01	Evaluator					
PA 93.02	Suggestion program coordinator					
	Review board					
PA 93.03	Board					
PA 94.00	System shall produce user definable notices to suggestion originator as well as appropriate State personnel when action on a suggestion is taken					
PA 95.00	Status information may be automatically provided via email at the option of the employee or applicable State personnel					
PA 96.00	A flexible research capability will exist for matching new suggestions with previously submitted suggestions.					
PA 97.00	Provide for the payments to employees when suggestions are implemented					
PA 97.01	Payment amount					
PA 97.02	Date					
PA 97.03	Total payment					
PA 98.00	System tracks and reports on information for employee suggestion program results:					
PA 98.01	Number of new, rejected, adopted suggestions for the requested period					
PA 98.02	Number of certificate, cash awards for the requested period					
PA 98.03	Amount of savings by user defined period					
PA 98.04	Amount of cash awards for the requested period					
	Safety & Worker's Comp					
PA 99.00	System produces the OSHA-200 reports.					
PA 100.00	System interfaces with payroll for processing employees receiving workers' compensation to ensure that employees are not receiving Worker's Comp and State pay (including leave) for the same hours					
PA 101.00	Ability for agencies to enter accidents, including:					
PA 101.01	Worker's comp					
PA 101.02	Incident only					
PA 102.00	Support transitional duty assignments					
PA 103.00	Track permanent and temporary work restrictions					

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PA 104.00	System must support processing for temporary partial disability assignments, including proper handling of employee payments					
PA 105.00	Maintain history of multiple incidents					
PA 106.00	Maintain multiple current injuries					
PA 107.00	Maintain history of all injuries					
PA 108.00	Provide information to Benefits Administration such that the State pays 100% of medical insurance premiums while on lost time					
PA 109.00	Ability to track total cost of injuries by employee, Agency, type of injury, etc.; including:					
PA 109.01	Medical payments					
PA 109.02	Lost time					
PA 109.03	Backfill costs					
PA 109.04	Any accommodations					
PA 110.00	System tracks accidents by the following elements with clearly defined operational procedures to avoid mis-identification of comparable data among agencies:					
PA 110.01	Incident number					
PA 110.02	Recording location					
PA 110.03	Date and type of accident					
PA 110.04	Injury class code					
PA 110.05	Body part					
PA 110.06	Days restricted work					
PA 110.07	Severity					
PA 110.08	Attending Physician					
PA 110.09	In network (Y/N)					
PA 110.10	Names of employees					
PA 110.11	Days lost from work					
PA 110.12	OSHA reported injury					
PA 110.13	Job titles of employees					
PA 110.14	Supervisor name					
PA 110.15	Cause of injury					
PA 110.16	Workers' compensation claim					
PA 110.17	Claim status					

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PA 110.18	Preventable/not preventable					
PA 110.19	Medical payments					
PA 111.00	System tracks accident history by employee of the following data elements:					
PA 111.01	Date and time of injury					
PA 111.02	Expected date of return					
PA 111.03	Flag if on restricted duty					
PA 111.04	Name and job title of injured worker					
PA 111.05	Actual date of return to work					
PA 111.06	Date temporary restricted duty should end					
	Date of maximum medical improvement					
PA 111.07	Lost time hours					
PA 111.08	Cost of time lost					
PA 111.09	Type of restriction					
	Employee History					
PA 112.00	System provides an Employee Profile Screen(s) which defines <u>all key fields</u> associated with an employee such as:					
PA 112.01	Employee name					
PA 112.02	Demographic data					
PA 112.03	Position data					
PA 112.04	Benefit plan participation					
PA 112.05	Salary data					
PA 112.06	Classification data					
PA 112.07	Beneficiaries					
PA 112.08	Bargaining Unit					
PA 112.09	Workers' compensation status					
PA 113.00	System tracks employee history on:					
PA 113.01	Position changes					
PA 113.02	Salary changes					
PA 113.03	Status changes					
PA 113.04	Demographic changes					
PA 113.05	Payroll data					
PA 113.06	Benefit elections					

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PA 114.00	System provides on-line inquiry and tracks the date of inquiry of all salary history for all employees.					
PA 115.00	System tracks application date and status of short and long term employee leave					
	Reporting and Query Requirements					
PA 116.00	The system will provide for online access to all employee leave data with appropriate security.					
PA 117.00	System should provide ability to access information in the employee information table(s) by:					
PA 117.01	Employee name					
PA 117.02	Employee number (SSN)					
PA 117.03	Position number					
PA 117.04	Agency					
PA 117.05	Class code					
PA 117.06	Cost Center					
PA 117.07	Pay Differential					
PA 117.08	Appointment Type					
PA 117.09	Hire Date					
PA 117.10	Location					
PA 118.00	System will include a flexible report writing capability that will allow reports to be formatted easily by user personnel					
PA 119.00	Standard reports will include selection criteria based on such data items as employee class, status, organization, etc. These must be available without modifying the standard report.					
PA 120.00	System maintains, control and reports on employees by special characteristics as defined by user					
PA 121.00	Establish position report					
PA 122.00	Promotion Report for any given time (generally the fiscal year). The report would include employee name, old classification, old budget unit, new classification, new budget unit, EEO information.					
PA 123.00	New Hires Report for any given time (generally the fiscal year). The report would include employee name, classification, budget unit, EEO information.					

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PA 124.00	Transfer Report for any given time (generally the fiscal year). The report would include employee name, old classification, old budget unit, new classification, new budget unit, EEO information.					
PA 125.00	Termination Report for any given time (generally the fiscal year). The report would include employee name, classification, budget unit, EEO information, and reason for termination.					
PA 126.00	Maintenance includes supporting requests from outside agencies regarding employment issues as well as for Retirement and COBRA needs.					